

# HUBBELL CONSULTING, LLC

## **Form ADV, Part 2B Brochure Supplement**

### **Thomas William Park Bowler**

Investment Consultant  
13850 Ballantyne Corporate Place, Suite 500  
Charlotte, North Carolina 28277

704-887-4930 (office)

[tbowler@hubbell-llc.com](mailto:tbowler@hubbell-llc.com)

March, 2020

This brochure supplement provides information about THOMAS WILLIAM PARK BOWLER that supplements the Hubbell Consulting, LLC Firm Brochure. You should have received a copy of that brochure. Please contact Brian C. Hubbell, Principal, if you did not receive Hubbell Consulting, LLC's Firm Brochure or if you have any questions about the contents of this supplement. Brian C. Hubbell can be reached at 704-887-4930 or via e-mail at [bhubbell@hubbell-llc.com](mailto:bhubbell@hubbell-llc.com), respectively.

Additional information about Thomas William Park Bowler is also available on the SEC's website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Part 2B of Form ADV: *Brochure Supplement***

**Item 1 Cover Page**

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**Supervised Person**

Thomas William Park Bowler, Principal  
Hubbell Consulting, LLC  
13850 Ballantyne Corporate Place, Suite 500  
Charlotte, North Carolina 28277

704-887-4930 (Office Telephone)  
[tbowler@hubbell-llc.com](mailto:tbowler@hubbell-llc.com) (E-mail address)

**Firm Contact Information**

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**Date of This Brochure Supplement**

March, 2020.

**Item 2 Educational Background and Business Experience**

**Thomas William Park Bowler**

1. Name: Thomas William Park Bowler (“Tom”)
2. Year of Birth: 1975
3. Education: Bachelor of Arts, Business Administration, Campbell University (2002)
4. Education: Master’s in Trust & Investment Management, Campbell (2003)
5. Examinations Passed:
  - FINRA Series 65 Uniform Investment Advisor Law Examination
  - Level I and Level II, CFA® Examination, CFA Institute
6. Designations:
  - Accredited Investment Fiduciary (AIF®), Center for Fiduciary Studies
  - Qualified Plan Financial Institute (QPFC™), American Society of Pension Professionals & Actuaries (ASSPA)
7. Business/Employment Background
  - SHDR Investment Advisors, Inc. – Investment Analyst/Assistant VP: 2003 - 2005
  - SHDR Investment Advisors, Inc. – Investment Consultant/Vice President: 2005-2007
  - Mercer – Investment Consultant/Associate: 2007-2008
  - PrimeTRUST Advisors – Chief Investment Strategist: 2008 – 2012
  - Hubbell Consulting, LLC – Director, Investment Research: 2014 - Present

**Information Regarding Designations:**

- AIF® - The Accredited Investment Fiduciary is a designation sponsored by fi360®, an organization whose purpose is to provide training and tools to support education and capability in carrying out the role of a fiduciary. Individuals who have undergone the AIF curriculum and passed an examination have obtained knowledge of best practices for implementing a prudent process to deploy on behalf of investment consulting provided to clients.
- QPFC™ - The Qualified Plan Financial Consultant program provides an understanding of general retirement planning concepts, terminology, distinctive features of qualified plans and the role of retirement plan professionals. The QPFC™ designation is sponsored by ASPPA – the American Society of Pension Professionals & Actuaries. ASPPA is non-profit professional organization acting on behalf of 16,000+ members to improve retirement income policy and does so by offering extensive educational opportunities including credentialing and certificate programs and continuing education programs.

**Item 3 Disciplinary Information**

**Thomas William Park Bowler – NO Disciplinary Action Imposed**

The following are four primary categories in which legal or disciplinary events may be imposed on a “supervised person” of the firm and, if applicable, must be disclosed to clients or prospective clients. As indicated in each of the four categories, THOMAS WILLIAM PARK BOWLER has NOT encountered any legal or disciplinary action nor has any “management person” of the Firm.

1. Criminal or Civil Action in a Domestic, Foreign, or Military Court - Applicable to the Investment-Related Business. **NONE.**
2. Administrative Proceeding Before the SEC, any Federal Regulatory Agency, any State Regulatory Agency, or any Foreign Financial Regulatory Authority – Applicable to the Investment –Related Business. **NONE.**
3. A Self – Regulatory Organization (SRO) Proceeding - Applicable to the Investment –Related Business. **NONE.**
4. Any other hearing or formal adjudication in which a professional attainment, designation, or license of the *supervised person* was revoked or suspended because of a violation of rules relating to professional conduct. **NONE.**

**Item 4 Other Business Activities**

***Thomas William Park Bowler has NO other financial activities, affiliations, or conflicts of interest*** including, but not limited to, the following list.

1. NO affiliation or pending registration with any broker-dealer;
2. NO affiliation or pending registration with a futures commission merchant, commodity pool operator, commodity trading advisor, or an associated person of the foregoing entities;
3. NO affiliation or material relationship or arrangement with any of the following persons or organizations (1) Broker – dealer or securities dealer of any kind, (2) Investment company or any “pooled” investment vehicles, (3) Other investment adviser or financial planner, (4) Futures commission merchant, commodity pool operator or trading advisor, (5) Banking or thrift institution, (6) Accountant or accounting firm, (7) Lawyer or law firm, (8) Insurance company or agency, (9) Real estate broker or dealer, or (10) Sponsor or syndicator of limited partnerships.; and
4. Does NOT recommend or select other investment advisors for clients and receive compensation from an investment advisor.

***Thomas William Park Bowler DOES have an affiliation with Hubbell Consulting, LLC as an employee.*** Hubbell Consulting, LLC provides “pension consulting” services that may be provided to clients for whom Hubbell Consulting, LLC also provides investment advisory services. There is no requirement that Hubbell Consulting, LLCs pension consulting services be engaged by any client to retain our investment advisory services. Similarly, there is no requirement that Hubbell Consulting, LLCs investment advisory services be engaged by any client to retain our pension consulting services.

**Item 5 Additional Compensation**

**Thomas William Park Bowler does NOT receive any** sales awards, prizes or any other form of gratuity. Thomas' compensation of salary and regular bonus, if any, and such bonus is not based on specific clients, new clients, or any numeric measure of the size of Hubbell Consulting clients.

**Item 6 Supervision**

All “supervised persons” of Hubbell Consulting, LLC are subject to supervision by Brian C. Hubbell, Founder. As supervision applies to Thomas William Park Bowler, we independently review every investment recommendation and corresponding “draft” of client deliverables and recommendations. We then mutually discuss all recommendations and deliverables, modify as necessary, and the final deliverable/recommendation is prepared and transmitted to the client.

**Brian C. Hubbell, Principal – Supervisor for Thomas William Park Bowler**

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Charlotte, North Carolina 28277

704-887-4930 (Office)  
[bhubbell@hubbell-llc.com](mailto:bhubbell@hubbell-llc.com) (E-mail)

**Item 7 Requirements for State-Registered Advisers**

As denoted in each of the categories below, THOMAS WILLIAM PARK BOWLER has NOT been involved in any one of the events listed below:

1. An award or otherwise being *found* liable in an arbitration claim alleging damages in excess of \$2,500, *involving* any of the following: **NONE**
  - (a) an investment or an *investment-related* business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices
2. An award or otherwise being *found* liable in a civil, *self-regulatory organization*, or administrative *proceeding* *involving* any of the following: **NONE**
  - (a) an investment or an *investment-related* business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.
3. If the *supervised person* has been the subject of a bankruptcy petition, disclose that fact, the date the petition was first brought, and the current status. **NONE**